



Customer Relationship
Management

CRM Phone Installation Guide

Version 14.1

Notices

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Preface

For details, see the following topics:

- [About this documentation](#)
- [Notation conventions](#)
- [Aurea global support](#)

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	<code>Fixed-width</code> font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
Bold Fixed-width	Bold Fixed-width font is used to indicate user input or to emphasize certain lines of code.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
Bold Sans serif	Bold sans serif typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>Italic serif</i>	In text, <i>italic serif</i> typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter -LOGF.
[]	Brackets enclose optional arguments.
{ a b c }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation File > > Exit means: "Open the File menu and choose Exit ."
>>	Links to related information in other chapters or documents are indicated using the >> symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on [Aurea Support Central](#). Preferably, search the articles on the [Aurea Knowledge Base](#) for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at <https://help.aurea.com/crm/#>.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, [contact us](#) through our [website](#).

1

Setup and Installation

This document describes how to install CRM.phone for Aurea CRM.Win and for Aurea CRM.Web.

To install a hotfix, see the "Installing Hotfixes" document that you can download from <https://support.aurea.com>.

Setup Requirements

The following requirements need to be met for setup to be successful:

- Access to the operating system with administrator rights.
- The installation requires 50 MB of free space on the hard disk.
- The installation can only be carried out on a supported operating system.

You can find the latest technical requirements on <https://support.aurea.com>.

CRM.phone for Aurea CRM.Win and Aurea CRM.Web

CRM.phone can only be used on conjunction with Aurea CRM.Win or Aurea CRM.Web.

The setup installs CRM.phone for either:

- Aurea CRM.Win (Aurea CRM.Win must already be installed)
- Aurea CRM.Web: The installer for Aurea CRM.Web is a centralized installation (the so-called "master" setup) that allows you to distribute installation packages (MSI) to users.

The master setup for Aurea CRM.Web consists of the following components:

1. All necessary files for CRM.phone.
2. The Windows installer (MSI package) in the `PhoneDeploymentPacket` directory:

`updateCRMphoneforCRMweb_8.1.xx.xx_fullinstallation.msi`

This file is used to install CRM.phone on the clients.

3. `update CRMphone.manifest.xml` in the `PhoneDeploymentPacket` directory:

Use this file to control the automatic distribution of updates.

4. Compiler for the Windows installer in the `PhoneDeploymentPacketCompiler` directory:

You can use the compiler to replace the default TAPI interface with another library you have programmed. You can add these new files to the MSI package in order to distribute them to users.

For more information, see [Windows Installer Package for Aurea CRM.Web](#).

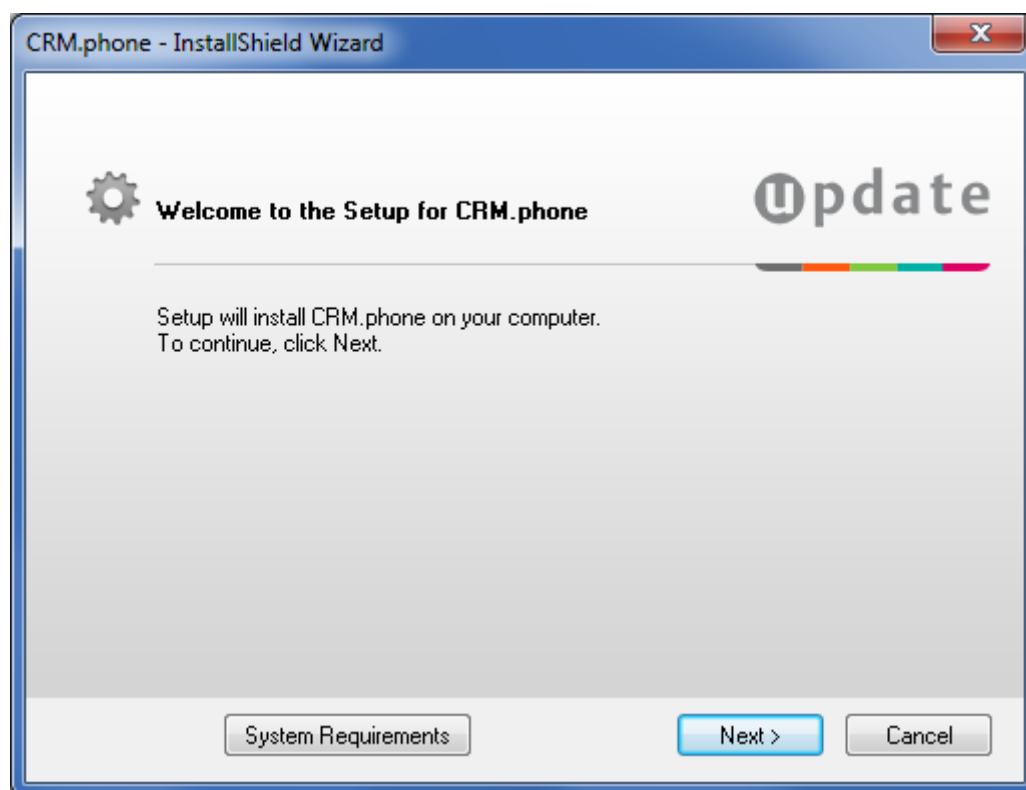
Installing CRM.phone

Learn how to install CRM.Phone.

To install CRM.phone:

1. Run `CRM.phone_8.1.exe` (available as download). The installation files are unpacked into the `CRM.phone` subdirectory. The `Setup.exe` file in this subdirectory is started automatically.

The start page is displayed.

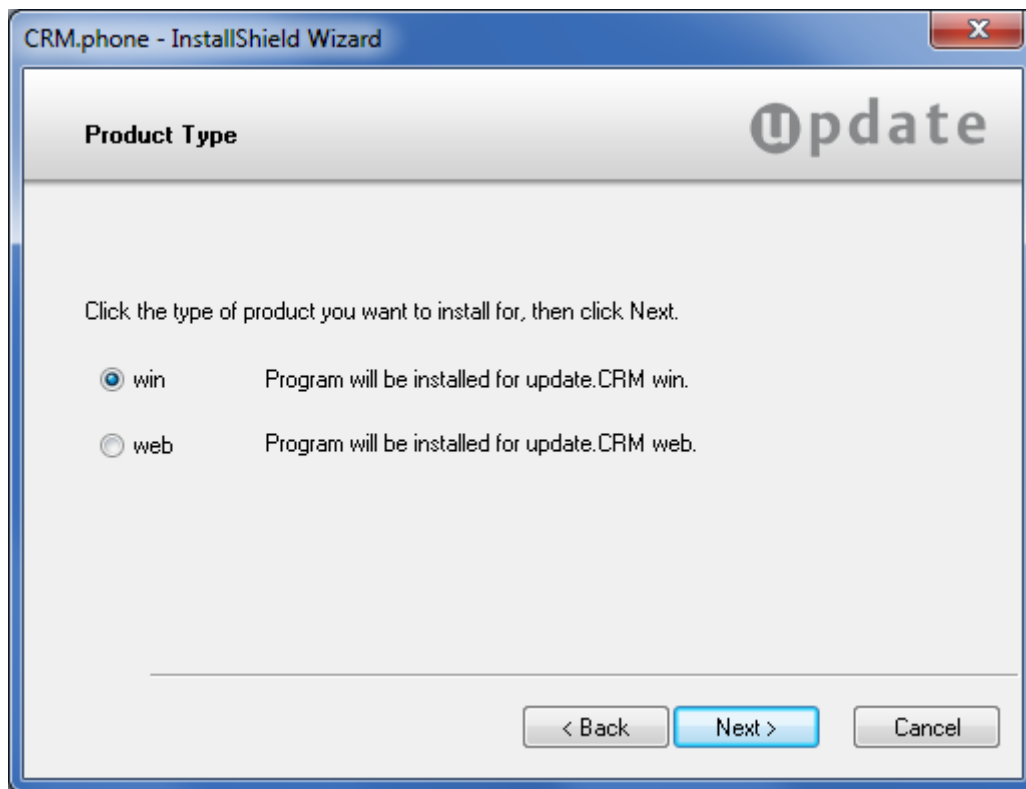


You can access the system requirements for CRM.phone from the start page.

2. Click on **Next**. The installer checks whether an existing version of CRM.phone is installed.

If the installer finds a current version in the registry, you can determine whether the existing version is updated or uninstalled.

The Product Type dialog box is displayed.



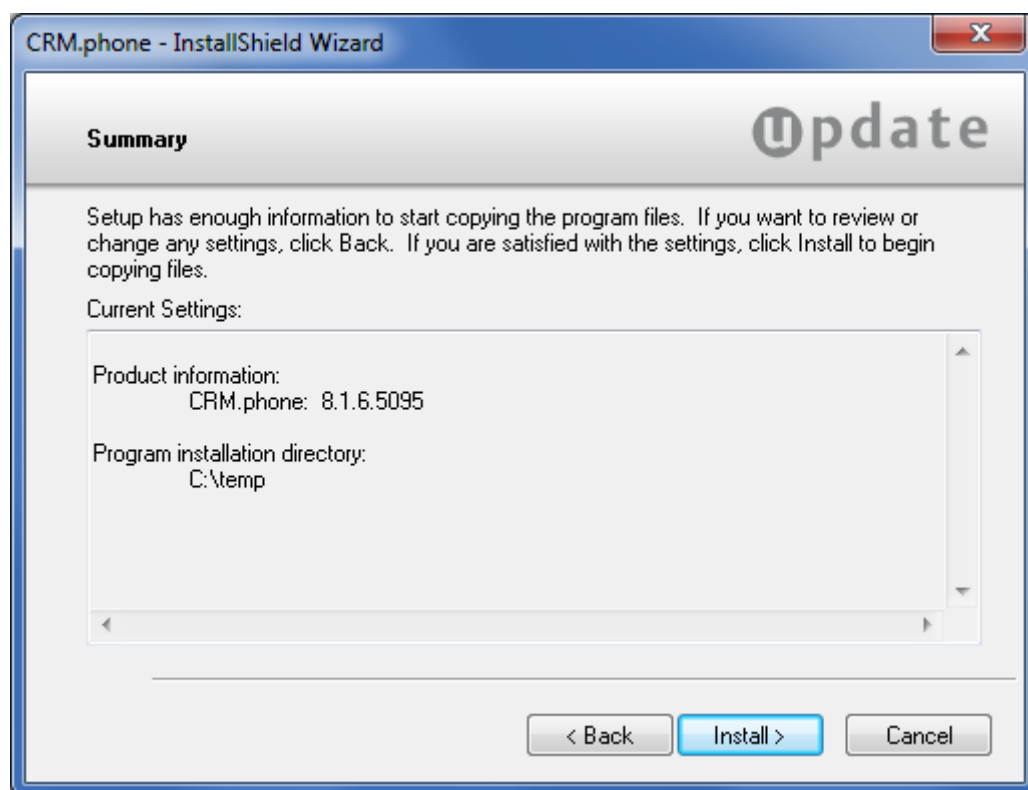
3. Select if you want to install CRM.phone for Aurea CRM.Win or for Aurea CRM.Web and click on **Next**:

- If you select Aurea CRM.Win, the installer checks if Aurea CRM.Win is already installed. If it exists, CRM.phone is installed in the same directory.

Note: CRM.phone cannot be installed without an existing Aurea CRM.Win installation.

- If you select Aurea CRM.Web, the installer checks if Aurea CRM.Web is already installed. If it exists, CRM.phone is installed in the same directory.

Before CRM.phone is installed, installer displays an overview with the provided settings. If you wish to make any changes, click on **Back** to return to the previous screens.

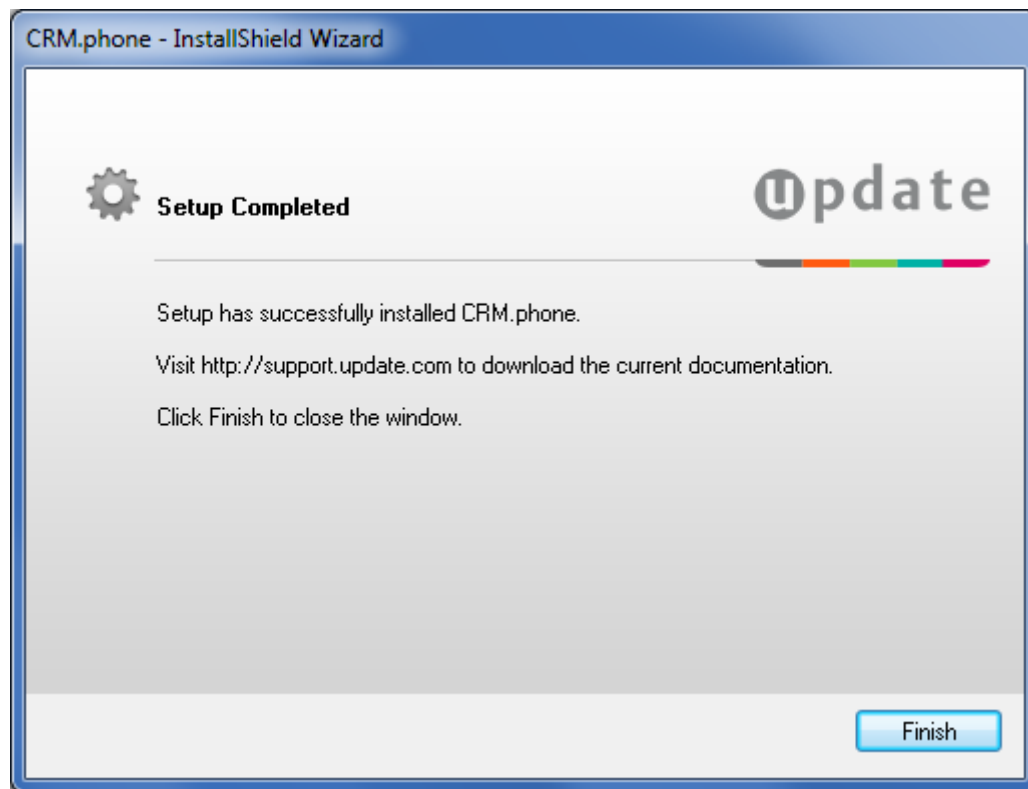


4. Click on **Install**.

The installation of CRM.phone begins.

The installer checks whether MS XML Parser 6.0 is installed on your system. If not, the installer automatically updates or installs MS XML Parser 6.0. MS XML Parser is required for certain functions.

A dialog box informs you when the installation is finished.



5. Click on **Finish** to complete the installation.

Upgrading CRM.phone

Learn how to upgrade CRM.phone.

To upgrade Aurea CRM win installation to the latest version, perform the following steps:

1. Unzip the installation package (phone_<version>_full.zip) to a local drive.
2. In the unzipped folder, double click setup.exe. The Upgrade setup wizard displays.



3. Click Next to start the upgrade process. The Setup Status window displays the status of the upgrade installation.
4. When the upgrade installation is complete, the Update Complete window displays.



5. Click `Finish` to complete the upgrade installation.

2

Windows Installer Package for Aurea CRM.Web

If you install CRM.phone for Aurea CRM.Web, you can distribute automatic updates to your users.

To do so, you first need to install CRM.phone centrally - the so-called "master" setup.

New Installation

In order to use CRM.phone with Aurea CRM.Web, you first need to install CRM.phone on the server (master setup). You can then distribute the Windows installer package (MSI) to individual users in order to install CRM.phone on the clients (e.g. using distribution software, by e-mail, using a download link in Aurea CRM.Web etc.).

This file is located under:

```
/PhoneDeploymentPacket/ updateCRMphonefor-  
CRMweb_8.1.xx.xx_fullinstallation.msi.
```

This installer must be executed on each computer you want to install CRM.phone on.

Note: You require administrator privileges to execute this file.

The installation does not require any user interaction. A progress bar is displayed, as are any errors that may occur.

Silent Setup

The Windows installer package can be executed in silent mode using the following command line:

```
msiexec/iupdateCRMphoneforCRMweb_8.1.xx.xx_fullinstallation.msi  
/quiet
```

Log File

If problems occur during installation, you can choose to write details to a log file specified from the command line.

Example:

```
msiexec /i updateCRMphoneforCRMweb_8.1.239.55783_fullinstalla-  
tion.msi /log MyLogFile.txt
```

Upgrade

Updated versions of CRM.phone are provided by update Software AG in the form of hotfixes. If you have downloaded a hotfix, you first need to apply the hotfix to the master installation. The following MSI file is located in `/PhoneDeploymentPacket/` for this purpose:

```
updateCRMphoneforCRMweb_8.1.xx.xx_fullinstallation.msi
```

This file can be used for new installations or to update an existing installation of CRM.phone for Aurea CRM.Web. This installer installs CRM.phone for all users of a computer, and requires administrator privileges.

Automatic Updates

You can determine that update packages for CRM.phone are distributed automatically to Aurea CRM.Web users.

Whenever a user logs on to Aurea CRM.Web, their currently installed CRM.phone version is compared to the version entered in `update CRMphone.manifest.xml` on the server (the master setup). If the versions are different the Aurea CRM.Web user can download the MSI package and then execute it.

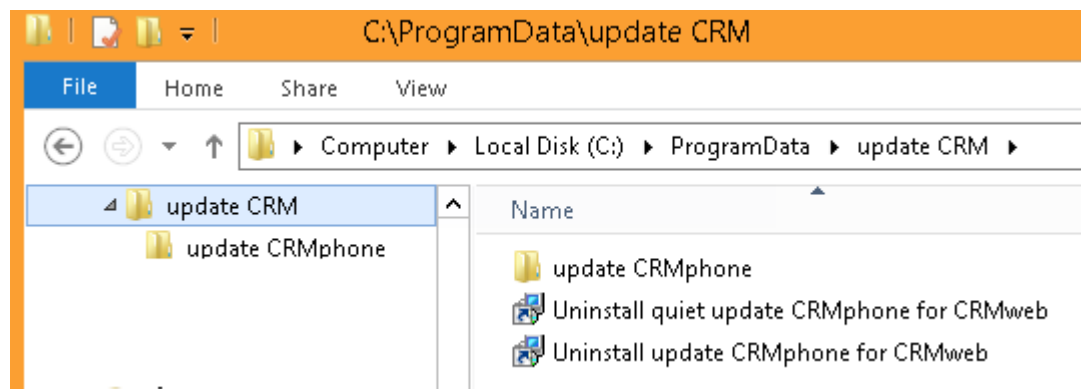
Uninstalling

You can use the following shortcuts to uninstall CRM.phone:

- For `updateCRMphoneforCRMweb_8.1.xx.xx_fullinstallation.msi` (administrator privileges are required):

```
c:\ProgramData\update CRM\Uninstall quiet update CRMphone for CRMweb.lnk
```

```
c:\ProgramData\update CRM\Uninstall update CRMphone for CRMweb.lnk
```



The "quiet" shortcut starts the uninstall process in silent mode.

You can also uninstall from the command line:

- `Msi msixec /x <ProductCode>`
- `Msi msixec /x <ProductCode> /quiet` (for a silent uninstall)

The current ProductCode is located in the following file:

C:\ProgramData\update CRM\update CRMphone\Product-Code_fullInstall.ini

Compiler

If you have created a new system DLL with the CRM.phone SDK to replace the TAPI interface, you can include this library in the MSI package using the compiler in the SDK, in order to include the DLL in the package distributed to your users.

Update Software AG creates MSI packages using the "Windows Installer XML (WiX) Toolset".

The required files are located in the `PhoneDeploymentPacketCompiler` directory.

To add the DLL to the MSI package:

1. Copy the DLL to where the other CRM.phone files (e.g. `uppTapiExt.dll`) are located in the master setup's directory.
2. Edit the `updateCRMphone_fullinstallation.wxs` file as necessary:

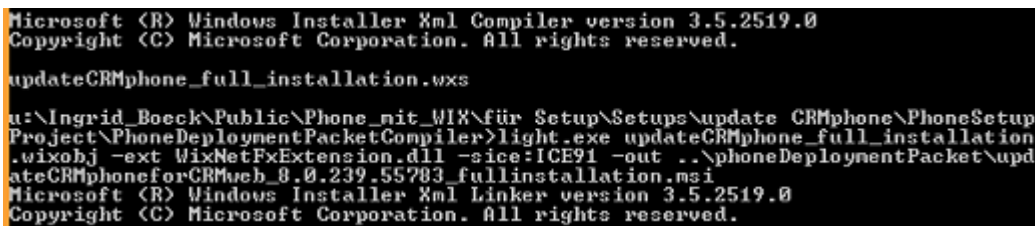
Search for the entry `Name=uppTapiExt.dll` entry:

```
<Component Id="UPPTAPIEXT.DLL" DiskId="1" Shared="yes" Guid="3B295027-3E24-4A1F-B4AF-8530DBAA8FF8">
  <File Id="UPPTAPIEXT.DLL" Name="uppTapiExt.dll" Source="..\..\uppTapiExt.dll" >
    <Permission User="Users" GenericAll="yes" /> </File>
</Component>
```

Replace the name of the file (`uppTapiExt.dll`) with the name of the new DLL (`xyyyzz.dll` in the example).

```
<Component Id="UPPTAPIEXT.DLL" DiskId="1" Shared="yes" Guid="3B295027-3E24-4A1F-B4AF-8530DBAA8FF8">
  <File Id="UPPTAPIEXT.DLL" Name="xyyyzz.dll" Source="..\..\xyyyzz.dll" >
    <Permission User="Users" GenericAll="yes" /> </File>
</Component>
```

3. Execute `Create_UpdateCRMphone_setup_fullinstallation.bat` to compile the new MSI package.



```
Microsoft (R) Windows Installer Xml Compiler version 3.5.2519.0
Copyright (C) Microsoft Corporation. All rights reserved.

updateCRMphone_full_installation.wxs

u:\Ingrid_Boeck\Public\Phone_mit_WiX\für Setup\Setups\update CRMphone\PhoneSetup
Project\PhoneDeploymentPacketCompiler>light.exe updateCRMphone_full_installation
.wixobj -ext WixNetFxExtension.dll -sice:ICE91 -out ..\phoneDeploymentPacket\upd
ateCRMphoneforCRMweb_8.0.239.55783_fullinstallation.msi
Microsoft (R) Windows Installer Xml Linker version 3.5.2519.0
Copyright (C) Microsoft Corporation. All rights reserved.
```

The new MSI package is created and stored in the `/PhoneDeploymentPacket/` directory. It now includes the new file (e.g. `xyyyzz.dll` instead of `uppTapiExt.dll`).

Note: update software AG supplies the entire XML source used to create the MSI packages. If you make additional changes to the XML source (beyond the change described in this chapter), update software AG assumes no responsibility for any problems and errors that may occur with the resulting installation and will **not** provide support.